

Huntington District Training Management System

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Introduction to the Training Management System

Training Management System (TMS) Overview

What is the Huntington District's Training Management System? Perhaps the best way to answer this question is by stating the goal of the Training Management System (TMS):

The goal of the Huntington District's Training Management System is to enable employees to achieve the organization's missions at the highest level practical.

So, in the broadest sense, the training management system isn't really about managing training. This system is concerned with the development of individual employees to align their current and future abilities with the mission requirements of the organization, within resource constraints.

What's in it? The Training Management System has three major components: 1) an Organizational Workforce Needs Analysis Process, 2) a Training Solution Process, 3) an "Other Solutions" component, and 4) a Training Evaluation Process.

What does this System look like? A flowchart of the System is on the following page.

Why was this System developed? To accomplish Key Success Factor 1, Strategy 3, Initiative 1 which states *Design a system to ensure provided training supports strategic objectives and individual needs* which was identified at the August 2000 Strategic Off-Site meeting.

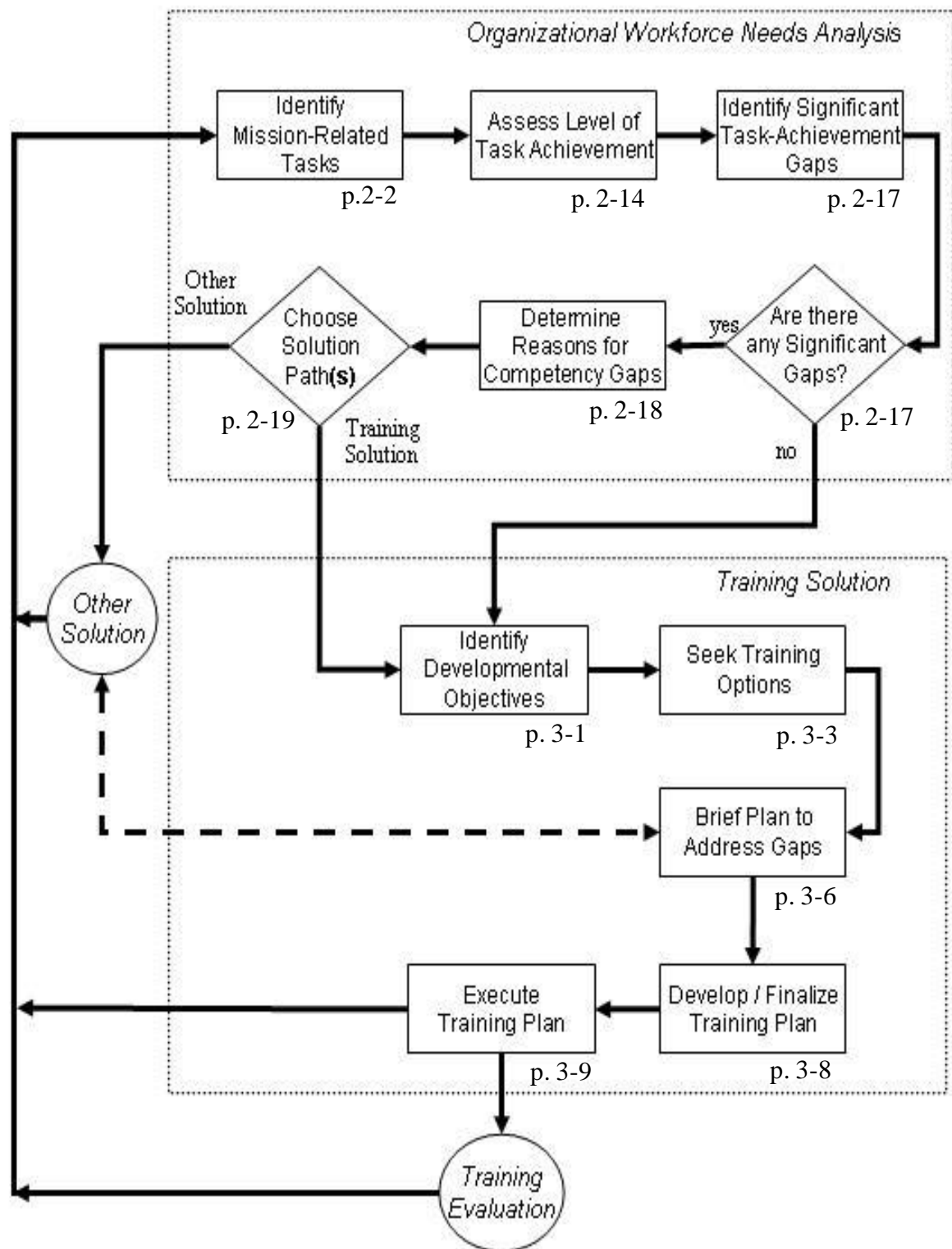
How was this System developed? A Training Action Team was formed to address the above-mentioned initiative. The Team spent considerable time researching current academic philosophies and principles related to training and development and reviewing multiple training management system models from other high performing organizations. Based on this research, the Team developed the District's Training Management System. The Quality Committee initially approved this System in concept as a way to ensure provided training supports strategic objectives and individual needs. The Training Action Team then identified multiple ways to accomplish the District's Training Management System. After critical review by the Team and Quality Committee, the following decisions were made and implemented: 1) adopt the METL approach to aid in accomplishing the Organizational Workforce Needs Analysis process, 2) adopt the Automated Training Management System developed by the St. Paul District to assist in fulfilling the Training Solution process, and 3) hire a full-time Workforce Development Specialist to carry out necessary actions within the Training Management System and evaluate executed Training Solutions.

Is METL the same as the TMS? No. METL, Mission Essential Task List, is a methodology used in the Army to assure alignment between a unit's mission and its training status. Huntington District uses the METL approach to document where an individual's tasks link to the District's mission. But, this documentation is only one part of the overall System.

What is ATMP? ATMP is the Automated Training Management Program. ATMP links tasks on an individual's task list to a developmental objective on the IDP. This Program also helps in the analysis of training requirements and final consolidation of the District Training Plan.

What is the time-line or schedule for developing the training plan? The “***Time-Line for Training Management System***,” on page 1-4 reflects the anticipated time-line the District will follow in developing the training plan.

Training Management System (TMS) Flowchart



Time-Line for Training Management System

The following dates reflect the time-line to develop the training plan. The Commander's training guidance sets the actual milestones.

1 Oct to 10 Nov—District Training Guidance issued. Identify Mission-Related Tasks and prepare task lists for all employees and elements. [Organizational Workforce Needs Analysis, Page 2-2]

1 Nov to 10 Jan—Supervisors assess levels of task achievement for employees and their element. [Organizational Workforce Needs Analysis, Page 2-14]

1 Dec to 10 Feb—Reasons for Task-Achievement Gaps, if any, determined. [Organizational Workforce Needs Analysis, Page 2-17, 2-18]

1 Jan to 15 Mar—Supervisors and employees identify developmental objectives and training options, completing the “final-draft” IDP. [Training Solution, Page 3-1, 3-3]

1 to 30 Apr—Briefings by Supervisors on plans to address any task-achievement gaps and training requirements. [Training Solution, Page 3-6]

1 May—Elements submit their training plans to the District Training Coordinator. [Training Solution, Page 3-8]

May to Aug—District Training Coordinator combines element training plans into a Draft District Training Plan. Commander determines funding level for training. District Training Coordinator coordinates with elements to finalize Training Plan. [Training Solution, Page 3-8]

Jun—PROSPECT courses portion of the District Training Plan finalized and submitted to Huntsville. [Training Solution, Page 3-8]

Sep—Commander approves District Training Plan. Supervisors and employees sign the final IDP. [Training Solution, Page 3-8]

Oct—Execute FY Training Plan. Begin cycle for next FY's Training Plan. [Training Solution, Page 3-9]

Acronyms Used in this Guide

ATMP—**A**utomated **T**raining **M**anagement **P**rogram

IDP—**I**ndividual **D**evelopment **P**lan

LRD—Great **L**akes and Ohio **R**iver **D**ivision

LRH—Huntington District

METL—**M**ission **E**ssential **T**ask **L**ist

PROSPECT—**P**roponent-**S**ponsored **E**ngineer **C**orps **T**raining (U.S. Army Corps of Engineer training courses offered through Huntsville.)

TAPES—Total Army Performance Evaluation System

Organizational Workforce Needs Analysis

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Organizational Workforce Needs Analysis Process

Overview

The Organizational Workforce Needs Analysis seeks to identify mission-related task-achievement gaps and select the appropriate solution path(s) to close each gap. This process recognizes that training is not the only solution for closing a task-achievement gap. However, when training is the appropriate solution, this analysis lays the foundation for selecting the best training to bridge the identified gap.

METL Structure

METL, Mission Essential Task List, is a methodology used in the Army to assure alignment between a unit's mission and its training status. Huntington District uses the METL approach to document where an individual's tasks link to the District's mission. But, this documentation is only one part of the overall System.

The mission essential task lists link together in a hierarchy, similar to a Work Breakdown Structure on a project. *Figure II-1* graphically displays how Task Lists can be linked together.

At the "top" of the hierarchy are the *METL* task lists. If an organization were to stop doing a METL task, it would result in a completely different organization than the one which currently exists. METL tasks are broad in nature, and are not used below the branch level. Some examples of METL tasks include:

- Provide emergency management and support resources.
- Protect, restore, and enhance the environment.
- Provide real estate acquisition services and support.
- Acquire, manage, and administer Architect-Engineer and Construction contracts.
- Provide internal support services that sustain primary work processes and meet stakeholder requirements.

Next in the hierarchy are the *Collective Task Lists*. A collective task is a task an element is responsible for executing, which supports the METL. Offices, branches, and sections will normally have task lists at the collective-level. While typically written at a level above what an individual would do, it is possible an individual may have an individual-level task that is also on the collective task list. Some examples of collective tasks include:

- Prepare and review tract appraisals.
- Prepare solicitations and contracts.
- Manage the Supply Program.
- Provide and Enhance Recreational Opportunities
- Provide guidance, support, and oversight for responsible functional areas.

Finally, the base of the hierarchy consists of *Individual Task Lists*. An individual task is a meaningful unit of work that describes the performance of an activity the individual performs, which supports their element's collective task list or METL. Individual tasks are more specific in nature than collective tasks. Some examples of individual tasks include:

- Performs basic plumbing repairs and installations.
- Present Interpretive Programs.
- Prepare operating budgets and ensure proper fiscal execution.
- Perform permit compliance reviews.
- Plot survey data using CADD software.

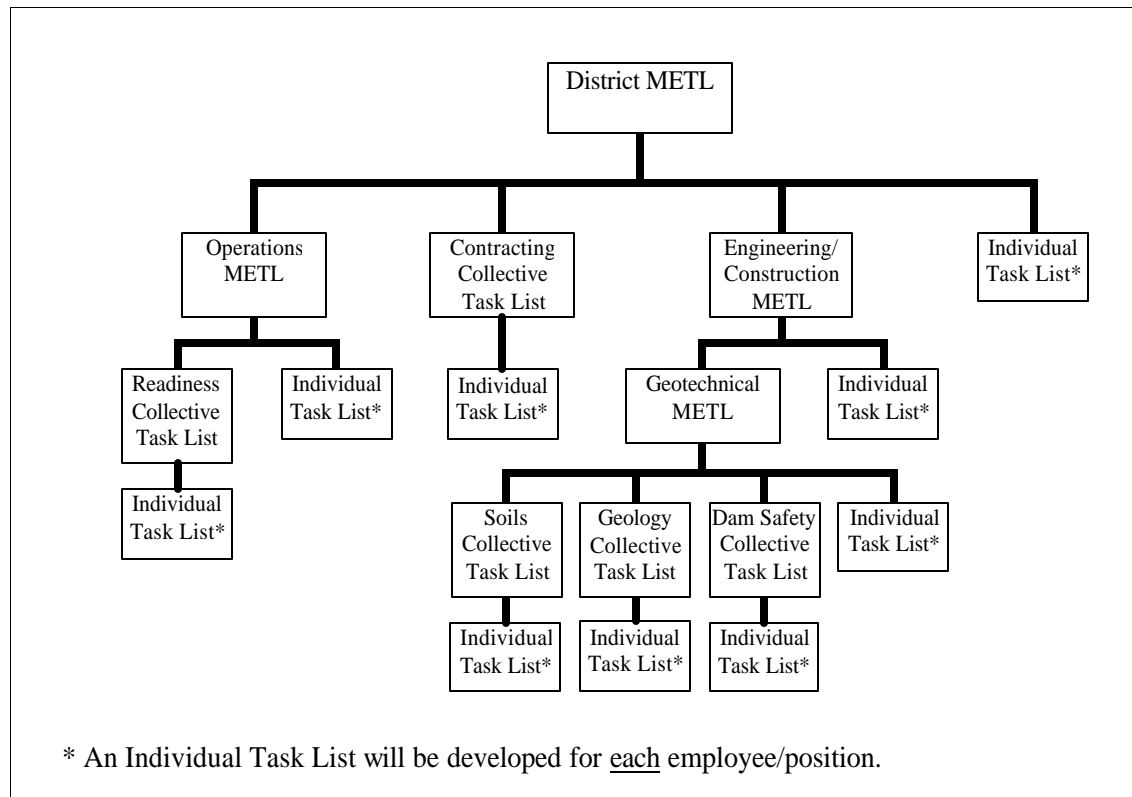


Figure II-1 An example of how Task Lists can be linked together.

Identify Mission-Related Tasks

Objective: This step 1) identifies mission-related tasks for the District, subordinate elements, and individuals, 2) links each task to one or more tasks at the next higher-level, and 3) assigns a level of importance to each task.

Inputs and Resources:

- LRD's current Campaign Plan, LRD's METL (Mission Essential Task List) and LRD's Commander's Training Guidance.
- District Mission Statement

- Huntington District's Strategic Business Plan and supporting documentation
- District Functions, CELRH Pam 10-2-1
- Huntington District's Civil Works Budget and Congressional Feedback
- Previous year's Mission Essential, Collective, and Individual Task Lists, as appropriate.
- Individual position descriptions

Products:

- Huntington District METL, linked to LRD's METL
- Division and branch METLs, with each task assigned a level of importance and linked to the District's METL
- Division, Office, branch, and section Collective Task Lists, with each task assigned a level of importance and linked to Task Lists from the element to which they report.
- Individual Task Lists, with each task assigned a level of importance and linked to the Task Lists of that individual's supervisory element.

The completed Task Lists with applicable linkages and levels of importance are entered into the ATMP (Automated Training Management Program) and appear in a table format.

Step 1 – Validate (Develop) the District METL

***Caution:** At this step of the Organization Workforce Needs Analysis, don't concern yourself with "training". Your focus should be on the tasks needed to achieve current and future District missions—not how well you are doing them.*

Step 1.1 – Review Background Material. The District's METL is reviewed and updated at the annual Strategic Planning Off-Site session. Attendees at this Off-Site normally include the District's Quality Committee, supplemented with individuals selected through the District's Strategic Planning Process. This Group (including the Commander) should:

- Review LRD's current campaign plan, LRD's METL, and LRD's Commander's Training Guidance.
- Review District Mission Statement
- Review LRH's Strategic Business Plan. (It should be noted that as a part of the Strategic Planning Process, contributions from the entire District's staff are considered.)
- Review relevant Customer Service Center documents addressing areas of future-focus for the District and LRH's performance improvement foundation.
- Review the District's Civil Works Budget and Congressional feedback, particularly workload trends.

Step 1.2 –Review the Current District METL. After reviewing background material, the participants at the Strategic Planning Off-Site validates the District's current METL is

still aligned with the District's roles and capabilities in fulfilling LRD's Campaign Plan and the District's Strategic Business Plan. The following table includes a list of questions for consideration in validating the current METL. Once the participants are satisfied with the METL, draft changes where necessary, the "draft METL" for the next FY is given to the District Commander for action.

Caution: *This list of tasks should be appropriate to District-level actions, e.g., it should be "plan, design, and develop quality water resource related projects," not, "conduct detailed cost-benefit analysis to determine the alternative that maximized NED."*

Questions Appropriate for Developing the District METL
Did I review all relevant references (such as the approved District Mission and LRD METL, LRD Commander's guidance, LRH's Strategic Business Plan, relevant Customer Service Center documents, and workload trends)?
What are the District's roles and capabilities in fulfilling the tasks for LRD's METL? What are the responsibilities of the District's subordinate elements?
If we successfully accomplish these tasks, will we satisfy the mission, as defined in LRD's METL, the LRD's Commander's training guidance, and the District's Strategic Business Plan?
Are the tasks written at a District-level? [see the caution above]
Are there any tasks on the list that aren't "Mission Essential?" Do all the tasks link to at least one task from the LRD METL?
Have we identified an "essential task" that isn't on the essential task list for LRD? Are there METL tasks on the LRD METL the District should or could do that aren't currently identified in our current duties?
Does the task list identify areas where too much emphasis may be placed upon one critical item to the exclusion of others?

Step 1.3 – Finalize the District METL. Upon receipt of LRD's METL for the upcoming FY, the Commander reviews LRH's draft METL, and makes necessary changes to account for new or changed mission direction since the Strategic Off-Site session. Next, the Commander links each task on the draft METL to one or more tasks listed on LRD's METL.

Note: *If an "essential task" considered necessary to accomplish an item on LRH's Strategic Business Plan is not supported by an LRD METL task, the District Commander will contact LRD to request a revision to their METL to accommodate the essential task.*

Step 1.4 – Request Approval of the District METL. The District Commander submits the draft District METL to the Commander, LRD, for approval. Once approved by the Commander, LRD, the tasks are entered into ATMP by the ATMP Manager in Information Management (IM).

Step 1.5 – Release the Approved District METL. After entry into ATMP, the District Commander releases the approved District METL to the workforce with a Commander’s training guidance memo outlining specific areas of command focus for the District.

Step 2– Validate (Develop) the Division- and/or Branch-Level METL

***Caution:** At this step of the Organization Workforce Needs Analysis, don’t concern yourself with “training”. Your focus should be on the tasks needed to achieve current and future District missions—not how well you are doing them.*

Step 2.1– Review Background Material. Review of a division or branch METL begins upon receipt of the approved METL from the next higher-level. The division or branch Chief is responsible for developing the task list for their element. In order to prepare properly, the Chief should

- Review the next higher-level METL and the District Commander's training guidance memo, selecting those items that apply to their element.
- Review District Mission Statement
- Review LRH's Strategic Business Plan and their element's tactical plan.
- Review relevant documents related to the element, such as the functional statements defined in CELRH Pam 10-2-1.

***Note:** These actions are written to assist supervisors of elements that either don’t have a task list, or else have had a change in functions which requires developing a new task list. For those elements with an existing task list and no significant change in functions, certain actions may not apply and can be skipped.*

Step 2.2 – Validate the Division or Branch METL. After reviewing the relevant reference materials, the Chief determines the element’s roles and capabilities in fulfilling the next higher-level METL. It may be helpful to consider the assigned roles for the element, as well as those responsibilities assigned to subordinate elements within their division or branch.

Next, the Chief (and others as desired) drafts a list capturing all the tasks needed to successfully execute the roles and responsibilities previously identified. The list of tasks should be appropriate to actions at the division- or branch-level, remaining broad in nature to capture all “mission essential” subordinate element tasks. The following table includes a list of questions for consideration when developing the METL. Once the list is finalized, the Chief links each task to one or more tasks on the METL of the next higher-level.

***Note:** All METLs must include the following task—“Strategically develop the workforce.” Because all training must be directly linked to a task on the element task lists, creating this specific task allows for training that is not directly linked to an individual’s current duties. Examples of training suitable for linking to this task include participation in the District’s Leadership Intern Program (LIP), Supervision and Leadership Education program (SALE), Mid-Career Retirement, or Defense Leadership and Management Program (DLAMP).*

Questions Appropriate for Developing a Division or Branch METL
Did I review all relevant references (such as the approved District Mission and METL, element functional statements, tactical plans, and the District Commander's guidance)?
What are my element's roles & capabilities in fulfilling the tasks on the District mission? What are the responsibilities of my subordinate elements?
If we successfully accomplish these tasks, will we satisfy my element's roles within that mission (with that mission being defined in the District METL and guidance)?
Are the tasks written at a level appropriate for my element?
Are there any tasks on my list that aren't mission essential? Do all the tasks link to at least one task from the District METL?
Have I identified an "essential task" that isn't on the essential task list for the District? [Contact the Commander to determine the possibility she or he will revise the District METL to accommodate the desired task.]
Are there tasks related to the District METL my element should or could do that aren't identified in our current duties? [Report any up my chain-of-command]
Does the task list identify areas where too much emphasis may be placed upon one critical item to the exclusion of others?

Note: *Mission Essential Tasks are entered into the ATMP and are limited to 75 characters per task.*

Step 2.3 – Assign Level of Importance. The final activity, prior to requesting approval, is to assign a Level of Importance to each task. There are three levels of importance—Critical, Important, and Beneficial. Level of Importance should be assigned in the same fashion task lists were developed, from the top down.

When determining the level of importance for a task, you must first consider the worst-case scenario for the District if the identified task is not accomplished. Next, you will answer the following questions related to the impact of that worst-case scenario to accomplishing the District's Mission Essential Task List. It may be helpful to insert the phrase "to the District" to the following questions:

Caution: *At this step of the Organization Workforce Needs Analysis, don't concern yourself with "training". Your focus should be on the tasks needed to achieve current and future District missions—not how well you are doing them.*

Note: *Supervisors will assign the letter code "B" (beneficial) to the task "Strategically develop the workforce" on all task lists.*

Questions to Use in Determining the Level-of-Importance for	
<p><i>Critical</i> – Expensive to the District in terms of money and/or people, or damage the agency’s reputation, or creates a dangerous hazard or extremely high safety risk?</p>	<p>For example: The “fix” will require several people throughout the District to be involved (in addition to and/or outside of their normal duties). OR, the worst-case scenario will include legal fees and/or financial restitution that are expensive to the District? OR, the District will likely receive several Congressionals and/or negative press related to the worst-case scenario? OR, the risk assessment score for the worst-case scenario is</p>
<p><i>Important</i> – A “noticeable cost” to the District in terms of money and/or people, or “tarnish” the agency’s reputation, or create a high or moderate safety risk?</p>	<p>For example: The “fix” may require a few people throughout the District to be involved (not likely to be outside of their normal duties). OR, the “fix” may include financial restitution that is merely “noticeable” to the District? OR, the District may receive Congressionals and/or negative press related to the worst-case scenario? OR, the risk assessment score for the worst-case scenario is “caution”?</p>
<p><i>Beneficial</i> – Little or no cost to the District in terms of money and people, and have no negative impact on agency reputa-</p>	<p>For example: The “fix” will not likely require additional people throughout the District to be involved. And, the “fix” will require little or no financial restitution to the District? And, the District is unlikely to receive Congressionals and/or negative press related to the worst-case scenario? And, the risk assessment score for the worst-case scenario is “low”? (NOTE:</p>

Step 2.4 – Request Approval for a Division or Branch METL. The division or branch Chief submits the METL to their supervisor for approval. The table below includes a list of review questions for the supervisor who will approve a division or branch METL to consider when conducting the review. Once approved, the division or branch Training Coordinator enters the approved METL into ATMP. The division or branch Chief releases the METL to their subordinate elements and those individual employees directly assigned to the Chief’s office.

Questions Appropriate to Reviewing the METL
What are the responsibilities of the District's divisions and Offices? What are this particular element's roles and capabilities in fulfilling the District's or division's METL?
If they successfully accomplish their tasks, will they satisfy that element's roles within the mission (with that mission being defined in the District METL and District Commander's guidance)?
Do all the tasks link to at least one task from the District or division METL?
Are the tasks written at a level appropriate for the element?
Did the element assign the appropriate level of importance to their tasks?
Are the District's tasks accounted for by all the division and Office task lists (or branch lists in the case of a division review of subordinate branches)?
Does the task list identify areas where too much emphasis may be placed upon one item to the exclusion of others?

Step 3 – Validate (Develop) a Division-, Office-, Branch-, or Section-Level Collective Task List

Caution: *At this step of the Organization Workforce Needs Analysis, don't concern yourself with "training". Your focus should be on the tasks needed to achieve current and future District missions—not how well you are doing them.*

Step 3.1 – Review Background Material. Review of a division, Office, branch, or section Collective Task List begins upon receipt of the approved task list (METL or Collective) from the next higher-level. The element Chief or Team Leader is responsible for developing the Collective Task List for their element. This may be done independently or the Chief/Leader may opt to include other individuals to assist her or him to complete the task list. In order to prepare properly, the Chief/Leader should:

- Review the task list from the next higher-level, selecting those items from the lists that are applicable.
- Review relevant documents related to the element, such as the functional statements defined in CELRH Pam 10-2-1
- Review the element's tactical plan.

Note: *These actions are written to assist supervisors of elements that either don't have a task list, or else have had a change in functions which requires developing a new task list. For those elements with an existing task list and no significant change in functions, certain actions may not apply and can be skipped.*

Step 3.2 – Validate the Element's Collective Task List. After reviewing the relevant reference materials, the Chief or Team Leader (and others, as desired) determines the

element's roles and capabilities in fulfilling the task lists for those elements higher in the chain-of-command. It may be helpful to consider this element's assigned roles, as well as those responsibilities assigned to any subordinate elements and/or individuals.

Next, the Chief/Leader (and others as desired) drafts a list capturing all the tasks needed to successfully execute those roles and responsibilities identified. The list of tasks should be appropriate to actions at the element's-level, and not at a level of detail found at the individual-level. The following table includes a list of questions for consideration when developing the Collective Task List. Once the list is finalized, the Chief/Team Leader links each task to one or more tasks on the task list of the next higher-level.

Note: *All collective task lists must include the following task—"Strategically develop the workforce." Because all training must be directly linked to a task on the element task lists, creating this specific task allows for training that is not directly linked to an individual's current duties. Examples of training suitable for this task include participation in the District's Leadership Intern Program (LIP), Supervision and Leadership Education program (SALE), or Defense Leadership and Management Program (DLAMP).*

Questions Appropriate for Developing the Division-, Office-, Branch-, or Section-Level Collective Task List
Did I review all relevant references (such as the approved District METL, element functional statements, tactical plans, and the District Commander's guidance)?
What are my element's roles & capabilities in fulfilling the tasks on the District mission and the task list of the element to which I report? If I have subordinate elements, what are their responsibilities?
If we successfully accomplish these tasks, will we satisfy my element's roles within the mission (with that mission being defined in the District's METL and the District Commander's guidance)?
Are the tasks written at a level appropriate for my element?
Are there any tasks on the list that aren't mission essential? Do all the tasks link to at least one task from the task list of the element to which I report?
Have I identified an "essential task" that isn't on the task list for the element to which I report? Are there tasks related to the District METL my element should or could do that aren't identified in our current duties? [Report any up the chain-of-command]
Does the task list identify areas where too much emphasis may be placed upon one critical item to the exclusion of others?

Note: *Collective Tasks are entered into the ATMP and are limited to 75 characters per task.*

Step 3.3 – Assign Level of Importance. The final activity, prior to requesting approval, is to assign a Level of Importance to each task. There are three levels of importance—Critical, Important, and Beneficial. Level of Importance should be assigned in the same fashion task lists were developed, from the top down.

When determining the level of importance for a task, you must first consider the worst-case scenario for the District if the identified task is not accomplished. Next, you will answer the following questions related to the impact of that worst-case scenario to accomplishing the District’s Mission Essential Task List. It may be helpful to insert the phrase “to the District” to the following questions:

Caution: *At this step of the Organization Workforce Needs Analysis, don’t concern yourself with “training”. Your focus should be on the tasks needed to achieve current and future District missions—not how well you are doing them.*

Questions to Use in Determining the Level-of-Importance for	
<p>Critical – Expensive to the District in terms of money and/or people, or damage the agency’s reputation, or creates a dangerous hazard or extremely high safety risk?</p>	<p>For example: The “fix” will require several people throughout the District to be involved (in addition to and/or outside of their normal duties). OR, the worst-case scenario will include legal fees and/or financial restitution that are expensive to the District? OR, the District will likely receive several Congressionals and/or negative press related to the worst-case scenario? OR, the risk assessment score for the worst-case scenario is</p>
<p>Important – A “noticeable cost” to the District in terms of money and/or people, or “tarnish” the agency’s reputation, or create a high or moderate safety risk?</p>	<p>For example: The “fix” may require a few people throughout the District to be involved (not likely to be outside of their normal duties). OR, the “fix” may include financial restitution that is merely “noticeable” to the District? OR, the District may receive Congressionals and/or negative press related to the worst-case scenario? OR, the risk assessment score for the worst-case scenario is “caution”?</p>
<p>Beneficial – Little or no cost to the District in terms of money and people, and have no negative impact on agency reputa-</p>	<p>For example: The “fix” will not likely require additional people throughout the District to be involved. And, the “fix” will require little or no financial restitution to the District? And, the District is unlikely to receive Congressionals and/or negative press related to the worst-case scenario? And, the risk assessment score for the worst-case scenario is “low”? (NOTE:</p>

Note: Supervisors will assign the letter code “B” (beneficial) to the task “Strategically develop the workforce” on all task lists.

Step 3.4 – Request Approval for Division-, Office-, Branch-, or Section-Level Collective Task List. The Chief/Leader submits the Collective Task List to their supervisor for approval. The table below includes a list of review questions for the supervisor who will approve a Collective Task List to consider when conducting the review. Once approved, the appropriate Training Coordinator enters the Collective Task List into ATMP and the Chief/Leader releases the Collective Task List to their subordinate elements, if any, and those individual employees directly assigned to the Chief's/Leader's office.

Questions Appropriate to Reviewing the Collective Task List
What are this element's roles and capabilities in fulfilling the tasks for my element?
If they successfully accomplish their tasks, will they satisfy their roles within the mission (with that mission being defined in the District METL and District Commander's guidance)?
Do all the tasks from this subordinate element link to at least one task from my element's task list?
Are the tasks written at a level appropriate for that element?
Did the element assign the appropriate level of importance to their tasks?
Are all of my element's tasks accounted for by all the subordinate elements assigned to me?
Does the task list identify areas where too much emphasis may be placed upon one critical item to the exclusion of others?

Step 4 – Validate (Develop) an Individual Task List

Caution: At this step of the Organization Workforce Needs Analysis, don't concern yourself with “training”. Your focus should be on the tasks needed to achieve current and future District missions—not how well you are doing them.

Note: Supervisors are responsible for developing the individual task list with all their employees, to include subordinate leaders. Students and co-ops require at least one individual task to accommodate mandatory training.

Step 4.1 – Review Background Material. Review of the Individual Task List begins upon receipt of the approved METL or Collective Task List from the element to which that individual is assigned. The individual's supervisor is responsible for developing the individual task list

In order to prepare properly, the supervisor should:

- Review the METL or Collective Task List for the element to which the employee is assigned.
- Review the employee's performance objectives within their TAPES.
- Review the employee's position description.

Note: *These actions are written to assist supervisors of individuals that either don't have a task list, or else have had a change in duties that requires developing a new task list. For those individuals with an existing task list and no significant change in duties, certain actions may not apply and can be skipped.*

Step 4.2 – Prepare the Individual Task List. After reviewing the relevant reference materials, the supervisor identifies those individual tasks necessary for the employee to accomplish the element's METL or Collective Task List. Additionally, the supervisor should consider any tasks assigned to this employee that are outside the element, and any standing committees or teams the individual may serve on (examples include serving as an EEO Counselor or being a member of the Quality Management Board). It is suggested the supervisor solicit input from the individual during the development of the task list. The following table includes a list of questions to consider when developing an individual task list.

Note: *Individual Task Lists are the most detailed in our Training Management System. The tasks included at this level should identify specifically what the individual must do in support of their element's tasks. For example:*

- Prepare and review tract appraisals.
- Prepare solicitations and contracts.
- Manage the Supply Program.
- Provide and Enhance Recreational Opportunities
- Provide guidance, support, and oversight for responsible functional areas.

Questions Appropriate for Developing the Individual Task List
Did I review all relevant references? Does this individual have duties outside those assigned to this element? Are they on any standing committees or teams?
What are this element's roles & capabilities in fulfilling the tasks for the next higher-level? What are the individual employee's responsibilities?
If the individual successfully accomplishes the defined tasks, will they satisfy their role(s) within the mission (with that mission being defined in the element's task list)?
Are there any tasks on the list that aren't mission essential? (Remember not everything on an employee's TAPES is mission essential.) Do the individual's tasks link to at least one task from this element?
Are the tasks written at a level appropriate for this individual's duties?

Are all of this element's tasks addressed by all the individual employees in this element (but make allowances for situations where employees outside this element do “work” for the element)? If all individuals in the element successfully accomplish their defined tasks, will they satisfy the element's roles within the mission (as defined in the element's task list)?
Does the task list identify areas where too much emphasis may be placed upon one critical item to the exclusion of others, or too much burden placed upon an individual?

Note: Individual Tasks are entered into the ATMP and are limited to 110 characters per task.

Step 4.3 – Assign Level of Importance. The final activity, prior to requesting approval, is to assign a Level of Importance to each task. There are three levels of importance—Critical, Important, and Beneficial. Level of Importance should be assigned in the same fashion task lists were developed, from the top down.

When determining the level of importance for a task, you must first consider the worst-case scenario for the District if the identified task is not accomplished. Next, you will

Questions to Use in Determining the Level-of-Importance for Tasks	
Critical – Expensive to the District in terms of money and/or people, or damage the agency’s reputation, or creates a dangerous hazard or extremely high safety risk?	For example: The “fix” will require several people throughout the District to be involved (in addition to and/or outside of their normal duties). OR, the worst-case scenario will include legal fees and/or financial restitution that are expensive to the District? OR, the District will likely receive several Congressionals and/or negative press related to the worst-case scenario? OR, the risk assessment score for the worst-case scenario is “high”? (NOTE: These questions are examples and should not be
Important – A “noticeable cost” to the District in terms of money and/or people, or “tarnish” the agency’s reputation, or create a high or moderate safety	For example: The “fix” may require a few people throughout the District to be involved (not likely to be outside of their normal duties). OR, the “fix” may include financial restitution that is merely “noticeable” to the District? OR, the District may receive Congressionals and/or negative press related to the worst-case scenario? OR, the risk assessment score for the worst-case scenario is “caution”? (NOTE: These questions are examples and
Beneficial – Little or no cost to the District in terms of money and people, and have no negative impact on agency reputation, and create little or no safety	For example: The “fix” will not likely require additional people throughout the District to be involved. And, the “fix” will require little or no financial restitution to the District? And, the District is unlikely to receive Congressionals and/or negative press related to the worst-case scenario? And, the risk assessment score for the worst-case scenario is “low”? (NOTE: These questions are examples and

answer the following questions related to the impact of that worst-case scenario to accomplishing the District's Mission Essential Task List. It may be helpful to insert the phrase "to the District" to the following questions:

Caution: *At this step of the Organization Workforce Needs Analysis, don't concern yourself with "training". Your focus should be on the tasks needed to achieve current and future District missions—not how well you are doing them.*

Note: *Supervisors will assign the letter code "B" (beneficial) to the task "Strategically develop the workforce" on all task lists.*

Step 4.4 – Approve the Individual Task List. When the supervisor is satisfied with the task list, she or he reviews it with the individual and approves it. The approved Individual Task List is entered into ATMP by the appropriate individual (assigned by the supervisor).

Assess Levels of Task Achievement

Objective: There are two objectives in assessing levels of task-achievement within the District's Training Management System. The first is to assess the capabilities of individuals to achieve their individual mission-related tasks. The second is to assess the capability of each element to achieve the tasks on their Collective Task List or METL. This assessment continues from the bottom toward the top of the hierarchy, until the entire District is assessed against the District METL.

Inputs and Resources:

- Task Lists for each individual and the element.
- Assessments from subordinate elements, if any.

Products:

- All Task Lists in ATMP, with the assessment column completed.

Step 1 – Assess Individual Task-Achievement

Caution: *It is important to remember TAPES performance objectives are not the same as the Tasks identified in this process. TAPES objectives are specific duties, often times, measurable and project specific, assigned to an individual employee. So, while an employee may rate an exceeded in all their TAPES objectives, it doesn't necessarily indicate an employee can perform all their Tasks at a level well above acceptable. Because an objective typically requires the application of several Tasks, an employee may be able to "compensate" for a weaker capability in one Task by superior performance in others.*

Step 1.1 – Determine acceptable levels of achievement of each task. The supervisor reviews each task on the individual's task list and determines what activities and behaviors display "acceptable" and "well above acceptable" levels of achievement for each task.

An activity is a tangible display, such as, the individual attends team meetings and prepares meeting minutes. A behavior is often an intangible display, such as, demonstrates active listening skills and treats people as they should be treated in team meetings.

Generally, each task requires several activities and behaviors in order to accomplish the task. The supervisor must determine which combination of activities and behaviors are considered “acceptable” and “well above acceptable” levels of achievement for each task.

Step 1.2 – Assess the employee’s current ability to achieve each task. After determining what activities and behaviors demonstrate "acceptable" and "well above acceptable" levels of achievement for each task, the supervisor assesses the individual employee's current ability to achieve each task listed on their Individual Task List, assigning one of the assessment titles from the table below.

The supervisor may choose to conduct this assessment with the assistance of the individual; however, the supervisor must do the actual assessment. The supervisor may also choose to review the individual's TAPES performance objectives (where specific performance objectives are assigned) looking for any connection between a specific objective and one or more tasks on the Task List.

Task List Assessment Table		
Assessment Title	Letter	Criteria (as determined by the Supervisor)
Trained	T	Some level above acceptable. Task accomplished with value added beyond the minimum requirements.
Partially Trained	P	Acceptable. Accomplished the minimum requirements.
Untrained	U	Un-acceptable. Does not meet minimum requirements.

Once the assessment is completed, the supervisor, or other designated employee, enters the appropriate assessment into ATMP for each individual task.

Step 2 – Assess Task-Achievement for an Element

Step 2.1 – Assess the elements ability to achieve each task. After completing the assessment for all individuals in the element, the supervisor assesses the ability of the entire element to achieve the element’s tasks list. This action is repeated until each Division-, Office-, Branch-, and Section-level task lists are assessed.

Note: *If the element has subordinate elements, the supervisor must include the subordinate element assessments in her or his “rolled-up” assessment.*

This assessment is based, in large part, upon the capability of the individuals within the

element to achieve their tasks (and any subordinate elements). Accordingly, the supervisor might find it helpful to consider this assessment as a “roll-up” of the individual assessments. Following is a list of questions to consider when assessing task achievement for the element.

Questions Appropriate to Assessing Element Task-Achievement
Have I reviewed all subordinate assessments?
As the supervisor, do I “know” my element well enough to accurately assess its capability? If not, who might?
Can the element perform the tasks identified on the task list and at what level of proficiency?

The supervisor then assesses the element’s capability to achieve each task listed on the element’s Task List, assigning one of the assessment titles from the table below.

Task List Assessment Table		
Assessment Title	Letter	Criteria (as determined by the Supervisor)
Trained	T	Some level above acceptable. Task accomplished with value added beyond the minimum requirements.
Partially Trained	P	Acceptable. Accomplished the minimum requirements.
Untrained	U	Un-acceptable. Does not meet minimum requirements.

Note: Supervisors will assign the letter code “T” (trained) to the task “Strategically develop the workforce” on all task lists.

Once the assessment is completed, the supervisor, or other designated employee, enters the appropriate assessment into ATMP for each element task.

Note: This action is repeated, starting with the subordinate elements, and moving up the organizational chart until all elements in the District are assessed. For example, the Civil Design Section completes its assessment, then Design Branch will complete its assessment, then Engineering and Construction Division (after all subordinate elements in the Division are complete) will complete its assessment.

Identify Significant Gaps in Task-Achievement

Objective: To identify individual “significant” task-achievement gaps, if any, which must be addressed to ensure the element is able to perform its mission adequately between now and the next four years.

Inputs and Resources:

- Task Lists for each individual and the element.
- Assessments from subordinate elements, if any.

Products:

- A “Task-Achievement Gap Worksheet” with the “significant” task-achievement gaps listed. [see sample in the Appendix]

Step – Identify Significant Gaps in Task-Achievement

The concept of “significant,” relative to a task-achievement gap, is an important one because there will always be task-achievement gaps in achievement for nearly every task if we strive to be a “world-class workforce.” However, it is not considered reasonable that every task in the organization will be achieved at a world-class level. Accordingly, our Training Management System is designed to “enable employees to perform the organization’s missions at the highest level practical.” In the spirit of meeting the intent

Factor Related to Gap Significance	Appropriate Question(s)
<i>Cost-effectiveness</i>	What's the relationship of the cost of the problem compared to an estimated cost for the solution?
Legal requirements	Are we legally required to maintain acceptable performance in this task? Can we legally obtain the solution(s)?
Stakeholder pressure	Do key stakeholders, including customers, require a solution?
Magnitude	What are the consequences to the organization if the task-achievement gap remains for the next 5 years? How many individuals are involved in this task-achievement gap?
Element Assessment	What's the effect of this individual task-achievement gap, upon the element's assessment?

of the word “practical”, the supervisor “filters” all task-achievement gaps, in an effort to focus District resources on those significant enough to warrant further activity during the foreseeable future.

It is assumed that all individual tasks have a task-achievement gap.

Caution: *this step in the Organizational Workforce Needs Analysis is concerned with assessing a skill, not assessing the lack of a training course. The need for an employee to attend a specific training course, such as mandatory training, is NOT considered a significant gap. Mandatory training is addressed in the Training Solution Process.*

The "significance" of an individual task-achievement gap can be partially determined by using the factors with related questions listed on the table below:

Caution: *Final step in the process, envision your element 5 years from now. What significant gaps could reasonably exist, e.g., Sally will retire in 3 years. Are there any potential significant gaps you need to address now?*

After determining which individual task-achievement gaps are significant, the supervisor lists those gaps on a “Task-Achievement Gap Worksheet” [see appendix] for each individual and continues to the next step within this process (Step 4 – Determine Reasons for Task-Achievement Gaps).

! Important: *If an individual has no significant task-achievement gaps, then move directly to Step 1 in the Training Solution path for that employee.*

Identify Reasons for Task-Achievement Gaps

Objective: In this step, the objective is to 1) analyze those task-achievement gaps considered significant in the previous step, 2) determine plausible reasons for the existence of a task-achievement gap, and 3) select an appropriate solution path(s) likely resolve the cause of a task-achievement gap.

Inputs and Resources: A “Task-Achievement Gap Worksheet” with the “significant” task-achievement gaps listed (completed in the previous step).

Products: The “Task-Achievement Gap Worksheet” with the “significant” task-achievement gaps, cause(s) for the gaps, reason for the gap and an appropriate solution path(s).

Step 1 –Determine Reason for the Gap

For each individual task identified as having a “significant” task-achievement gap, the supervisor must determine plausible reasons for that gap’s existence. This process assumes the reasons for task-achievement gaps are caused by environmental, motivational, and/or knowledge/skills factors. The following list of questions is provided to help the supervisor determine the likely reason(s) for each individual task-achievement gap.

! Important: As each question is answered, the supervisor will note in a bullet format, the details for any “No” response on the “Task-Achievement Gap Worksheet.” These bullets serve as a partial record of the actual causes for the gap, and will be useful in identifying possible solutions to address the gap.

Note: There may be more than one reason for an individual task-achievement gap.

“Reason”	Questions to Ask
Environmental If you answer no to any of the questions... <ul style="list-style-type: none"> • Environmental factors must be addressed • Training alone is unlikely to address the gap 	E-1—Do (will) employees have adequate tools/technology, resources, or information to achieve the task? E-2—Are task-related behaviors and activities communicated clearly and timely? E-3—Is the employee satisfied with their general working conditions? E-4—Do standard operating procedures, work processes, and regulations aid in achieving the task?
Motivational If you answer no to any of the questions... <ul style="list-style-type: none"> • motivational factors must be addressed • Training alone is unlikely to address the gap. 	K-1—Have the employees successfully achieved these tasks before? K-2—Have employees been trained in the work processes and tools/technologies that are (will be) used to achieve the task?
Knowledge/Skills If you answer no to any of the questions... <ul style="list-style-type: none"> • A lack of knowledge or skills can be solved through training. 	M-1—Are there mechanisms in place to measure task related performance and provide feedback to performers? M-2—Will individual employees receive recognition for achieving tasks? M-3—Will there be consequences for failure to achieve tasks? M-4—Have managers and supervisors been trained to facilitate change-management processes needed to achieve the tasks?

Step 2 – Identify Appropriate Solution Path(s)

After determining the reason(s) of each significant task-achievement gap, the supervisor needs to determine if that particular reason is likely to be resolved by: a) training, b) some other solution, or c) a combination of both.

Note: It is recognized that limits on time and money make it impractical to assume all task-achievement gaps can be resolved within a single fiscal year. Keep in mind that Individual Development Plans are for 5-years. Therefore, it is expected that solutions paths are identified for all significant gaps, even if the implementation of that solution may be four- or five-years into the future.

The table below can be used to determine which solution path will most likely address the task-achievement gap. If the gap can be solved through training, the supervisor will identify the Training Solution path for that task on the “Task-Achievement Gap Worksheet” [see appendix]. If the gap can be solved through an action other than training, the Other Solution path is listed for that task.

Note: The Other Solution path is not a separate process, nor is it managed as an integral component of the Training Management System. The Other Solution path is intended to serve as a reminder to the supervisor and employee that other solutions, beyond training exists in the district to address a task-achievement gap. For example, if one of the causes is a problem with a cross-functional process, the supervisor may opt to elevate it to the District’s Quality Management Board for study by a process action team.

Questions to Ask to Determine which Solution Path will most likely address the gap	Solution Path
Does the employee lack the knowledge or skill needed to perform the task?	Training
If training is the best solution path, is some other solution required to allow that employee to use and reinforce the knowledge and skills learned? [For example, if the employee goes to CADD training in FY 05, but the CADD system isn’t scheduled to arrive until FY 08, will that employee be able to use and reinforce the knowledge and skills learned in the CADD training?]	“Other”
Is the reason for the task-achievement gap environmental or motivation?	“Other”
If the reason is motivational or environmental—is the employee’s temperament such that she/he would likely benefit from training appropriate to that causal factor?	Training

The briefs shall be given to the Chief’s or Leader’s supervisor. That supervisor offers feedback and approves the plan(s) to address the significant task-achievement gaps for the element, if appropriate. The Chief or Leader makes any necessary changes to the plans to address the task-achievement gaps, including changes to the IDPs.

This briefing sequence continues from the bottom toward the top of the organizational hierarchy until the division and Office Chiefs have prepared and delivered their briefings to the Commander. Following the briefing of the District Commander, division and Office Chiefs will review their element's IDPs to confirm that all training options listed, particularly in the mandatory and career development areas, are appropriate; and the changes resulting from feedback in the briefings is captured. Following this review, the IDPs will be considered as "final draft" IDPs.

Appendix

Employee: Jane Doe

SAMPLE

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Training Solution

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Training Solution

Training Solution Overview

The Training Solution process, within the District's Training Management System, affords each organization and individual a way to link their training needs with efforts to close any significant task-achievement gaps and also support individual career development. Completion of this process results in an approved District Training Plan and approved IDPs for each individual in the District.

Identify Developmental Objectives

Objective: In this step, the objective is to 1) identify employee developmental objectives that address significant training related organizational task-achievement gaps; 2) discuss employee career goals; and 3) review applicable mandatory training requirements.

Note: *Supervisors must first accomplish the District's mission and satisfy the needs of the customer. Following that, consideration will be given to individual career development.*

Inputs and Resources:

- An "initial-draft" IDP with mandatory training for each employee.
- Individual "Task-Achievement Gap Worksheets" recommending Training as the appropriate method to address the significant task-achievement gap. This worksheet was developed in Step 4 of the Organizational Workforce Needs Analysis.

Product: A draft Individual Development Plan for each employee with the developmental objectives section completed and each developmental objective linked to the appropriate task. This document is generated through the ATMP.

Preparatory Work: Before the discussions with the employee outlined in Action A (below), the appropriate element Training Coordinator must enter applicable mandatory training on each employee's "initial draft" IDP for review.

Step 1 – Discuss Areas of Focus for the IDP

With the initial-draft IDP in hand, Supervisors will meet with each employee to discuss any necessary changes and/or additions to their IDP. The Supervisor will incorporate the following items into the discussion with each employee:

- 1) The individual and organizational needs, specifically focusing on the individual's significant task-achievement gaps, if any (identified in the previous step; refer to the Significant Task-Achievement Gap worksheet). During this portion of the discussion, the Supervisor focuses on what the employee should be able to do differently after they've completed training.
- 2) The employee's formal career program (if applicable). Recognize that training identified as "mandatory" for a career program, may not be "mandatory" from the District's perspective.
- 3) Other career goals the employee may have identified. Realistic steps should be outlined and a timeline developed to achieve those steps.
- 4) Review the mandatory training listed on the initial-draft IDP for accuracy.

Note: *Resource limitations, such as time and funding, make it impractical to assume all task-achievement gaps can be resolved within a single fiscal year. Keep in mind that Individual Development Plans are designed for a 5-year time frame. Therefore, it is expected that developmental objectives will be identified for all significant "training" gaps, even if the implementation of that solution may be four or five years into the future.*

Step 2 –Draft Developmental Objectives

Caution: *The focus in this action is on identifying developmental objectives. Avoid the temptation to jump directly to identifying the actual "type" of training or a specific training course at this stage.*

Based upon the information shared in the discussion with the supervisor, the employee prepares draft developmental objectives in ATMP to:

- 1) address significant task-achievement gaps identified in the assessment (if any),
- 2) support their individual career goals (to include established career program requirements). Every developmental objective must link to a task on the individual's Task List.

Note: In preparing the developmental objectives, the employee is asking themselves the question, “What do I want to do or should I be able to do differently after I have training?” An “ideal” developmental objective uses an action verb, is specific, and understandable. Some examples of developmental objectives are:

- Implement a backlog of maintenance database in Microsoft Access.
- Maintain professional engineer registration.

Step 3 – Finalize Developmental Objectives

The supervisor and employee review the draft developmental objectives to ensure they 1) address the specific areas of focus agreed to in the initiation discussion (Action A above), and 2) align to the correct Individual Task. Following this discussion, the employee, or other designated employee, will make any necessary changes to the draft developmental objectives and enter those objectives into the ATMP upon supervisor’s final approval.

Note: In this review, the Supervisor is asking herself or himself the question, “What do I want this employee to do differently after they’ve had training?”

Seek Training Options

Objective: Select specific training options to accomplish each developmental objective.

Note: The term “Training Options” refers to all the types of training available to an employee to address a developmental objective.

Inputs and Resources:

- An initial-draft IDP with developmental objectives and mandatory training listed.
- Sources of training options. [examples of training options are included in Action A]
- Vendor Catalogs on the Training Channel in Knowledge Dispatch

Product: A “final-draft,” 5-year, Individual Development Plan. This document is generated through the ATMP.

Note: Under this new approach, supervisors no longer approve IDPs prior to submitting the division or office training plan. Under the ATMP and our Training Management System, IDPs should not be approved until the District Commander approves the District Training Plan, because the “automated” IDPs within the ATMP are the District’s Training Plan.

Step 1 – Identify Multiple Training Options

The employee identifies multiple training options to satisfy, in whole or in part, each agreed upon developmental objective on the initial-draft IDP. Element Training Coordinators serve as one resource to help the employee identify sources for training options, e.g., the “Purple Book” or a training vendor catalog; however, the Training Coordinators will not identify specific training for an employee. The employee can also locate links to various Government and Non-Government vendor catalogs from the Training Channel in Knowledge Dispatch.

Examples of Training Options	
Formal Classroom Training	Non-Government course (College, Vocational School, etc.) Government course (PROSPECT, USDA Grad School, etc.) Seminar (FWP, Franklin Covey, etc.) Facilitated video
Distance Learning	On-line course Web-based course Correspondence course
On-the-Job/Self Training	Developmental assignment Job shadowing Purchasing a Book Video

Using those resources, the employee writes a list of training options for each developmental objective. Each training option included on the list should include the following information: a synopsis of that training option, length of the training, location, tuition and other fees (if any).

Step 2 – Select Specific Training Option(s)

The supervisor, with the employee’s input, selects the appropriate training options she or he believes will allow for the accomplishment of each developmental objective. Following is a list of some questions to consider when selecting specific training option(s).

Some Questions Appropriate to Selecting Training Options
What is my expectation of “success” from a particular training option; given the employee’s learning style, the nature of the task-achievement gap, and the specific developmental objective?
When do I need to have the gap “fixed?” Does the solution meet my timeline? Does the employee have to complete this training option before they can take advantage of other solutions?
Is the cost of this training option “reasonable,” relative to the cost of the task-achievement gap?

Step 3 – Complete “Final Draft” Of IDP

Note: When a supervisor agrees to place a training option on the IDP, there is no guarantee that option will be included on the District’s Training Plan.

The employee, or other designated individual, completes the “final draft” IDP in the ATMP, listing the agreed training options, associated costs, and priority. The employee may ask the element Training Coordinator and the individual in the element who normally does travel orders to help them determine the associated costs, if necessary.

Note: If the supervisor and employee agree upon a course that is not already entered into the ATMP database, they will need to work with the element’s Training Coordinator to enter that course in the database.

The employee, or other designated individual, will enter a code representing the “training priority” in the ATMP for each of the developmental objectives. In most situations, the training priority will align with the assessment of the Individual Task. The table below identifies the training priority code to be entered into the ATMP for each developmental objective, based upon the task assessment assigned earlier in the system.

Chart of Training Priority Codes	
Task Assessment or Other Designation	Priority Code
If Mandatory Training,	use— 0
If the task assessment is Untrained/Critical,	use— 1
If the task assessment is Untrained/Important,	use— 2
If the task assessment is Partially Trained/Critical,	use— 3
If the task assessment is Untrained/Beneficial,	use— 4
If the task assessment is Partially Trained/Important,	use— 5
If the task assessment is Trained/Critical,	use— 6
If the task assessment is Partially Trained/Beneficial,	use— 7
If the task assessment is Trained/Important,	use— 8
If the task assessment is Trained/Beneficial,	use— 9
If Strategic Workforce Development Training (for example, LIP, SALE, or DLAMP),	use— 88

Once this action is complete and the supervisor is satisfied with the final-draft IDP, the employee is “locked out” of the ATMP and is no longer able to make personal changes to their IDP. Future changes must be made by the supervisor or the element’s Training Coordinator.

Briefings of Plans to Address Task-Achievement Gaps

Objective: This step serves as a check for all organizational elements to assure they have a plan to address significant task-achievement gaps. It also affords mid- and senior-level managers an opportunity to verify significant task-achievement gaps are satisfactorily addressed.

***Note:** This step is included in the Training Solution Path in an effort to aid both reader understanding and the flow of the document. For the “process purists” in the audience, if you’re of the opinion that this step is distinct from the Training Solution path and should be shown separately, we welcome your suggestions as to how to do so.*

Inputs and Resources:

- The “Task-Achievement Gap Worksheets” with the “significant” task-achievement gaps, cause(s) for the gaps, reason for the gap and an appropriate solution path(s) for each individual in the element. [see sample in the Appendix]
- Various summary print-outs from the ATMP that list developmental objectives and training options linked to tasks with significant task-achievement gaps and resource requirements for those training options.

Products:

- A briefing identifying the element’s task list, assessment of task-achievement, and significant task-achievement gaps with a plan to address those gaps. For those element(s) that link directly to the District METL, the briefing will be presented in PowerPoint.
- A final-draft IDP of the intended training options selected to address the task-achievement gap reflecting changes recommended in the briefing, if any.
- A list of actions the element has committed to pursue in the “other solutions path” to address the task-achievement gap, which reflects changes recommended in the briefing, if any.

Step – Present Task List Assessments and Action Plans

The element Chief or Leader at the Collective Task List-level prepares a brief (see appendix for sample) identifying:

- 1) the element’s mission,
- 2) an assessment of each task on the Collective Task List, and
- 3) significant task-achievement gaps in the element with a plan to address each gap.

All lower-level task lists are to be compiled for this brief; therefore, all lower-level assessments must be completed prior to this action. The plan to address the significant gaps should include the training options (with associated costs) and “other solution options” (with specific planned actions).

The briefs shall be given to the Chief’s or Leader’s supervisor. That supervisor offers feedback and approves the plan(s) to address the significant task-achievement gaps for the element, if appropriate. The Chief or Leader makes any necessary changes to the plans to address the task-achievement gaps, including changes to the IDPs.

Note: *This action is repeated, starting with the subordinate elements, and moving up the organizational chart until all elements in the District brief. For example, the Civil Design Section completes its assessment briefing, then Design Branch will complete its assessment briefing, then Engineering and Construction Division (after all subordinate elements in the Division are complete) will complete its assessment briefing.*

This briefing sequence continues from the bottom toward the top of the organizational hierarchy until the division and Office Chiefs have prepared and delivered their briefings to the Commander. Following the briefing of the District Commander, division and Office Chiefs will review their element's IDPs to confirm that all training options listed, particularly in the mandatory and career development areas, are appropriate; and the changes resulting from feedback in the briefings is captured. Following this review, the IDPs will be considered as "final draft" IDPs.

Develop/Finalize Training Plan

Objective: Provide the District with an approved Training Plan and each employee with an approved IDP.

Inputs and Resources: Final-draft IDPs, adjusted for comments received from the briefings provided in Part III, Step 3, **Briefings of Plans to Address Task-Achievement Gaps**.

Products: An approved District Training Plan and approved IDPs.

Step 1 – Determine Constraints to Place On Training Plan

The District Commander, with input from other individuals as desired, will determine what resource constraints, if any, to place on the District's Training Plan. The Commander may opt to request a briefing from selected elements to assist in making her or his resourcing decision. The decision on constraints will be communicated to the Division and Office Chiefs in a manner the District Commander considers most appropriate.

Step 2 – Seek Cost Avoidances in the Draft Training Plan

During this Action, the following must occur:

- 1) The Workforce Development Specialist works with element Chiefs to assist them in meeting the constraints placed upon their elements training plan, if any.
- 2) The Workforce Development Specialist reviews training options for the entire District, looking for more cost effective ways to provide that training. For example, the Workforce Development Specialist may identify enough individuals requiring a PROSPECT course to warrant bringing that course on-site, saving travel and per diem costs. Such proposals are then briefed to the Corporate Board for approval.
- 3) Division and Office Chiefs make appropriate revisions to the final-draft IDPs and element training plans to incorporate any resource constraints and savings prior to the next action.

Step 3 – Finalize PROSPECT Course List

In early June, the Workforce Development Specialist submits a list of the PROSPECT courses, obtained from the Training Plan, to Huntsville. The remaining training options on the District's Training Plan are still in a "draft" status, and appropriate revisions will occur as work continues on the District's Operating Budget.

***Note:** PROSPECT courses cannot be added to or removed from the Training Plan once the list is submitted to Huntsville.*

Step 4 – Finalize Training Plan

In late July or August, the Workforce Development Specialist makes adjustments to the Training Plan to incorporate the allocations received for Huntsville. Division Office Chiefs finalize the remaining training options to meet resource constraints and ensure recent workforce changes are considered before September.

Those training options that are selected to be part of the training plan will remain in the current planning fiscal year. All training options that were not selected for this training plan are reassigned to the next Fiscal Year on the individual's IDP by the appropriate element supervisor or Training Coordinator.

Step 5 – Provide District Training Plan to the Commander for Approval

The Workforce Development Specialist will "roll-up" the final draft IDPs from each element into the District Training Plan. The Workforce Development Specialist will provide the District Training Plan to the Commander for approval.

Execute Training Plan

Objective: Execute the training plan, reflecting actual changes throughout the year, staying within budget.

Inputs and Resources: Workforce, workload, and budget changes; Training Plan in ATMP; all previous steps in this User's Guide.

Product: A record of the Training Plan, as executed, reflecting all additions, deletions, and completions.

Step 1 – Monitor Training Plan

Managers and Supervisors, with the assistance of Training Coordinators, will monitor their organization's Training Plan. This should be done continually throughout the year to ensure 1) employees are aware of upcoming training events, 2) appropriate forms, such as, the DD 1556 Training Request Forms and Training PRACs are completed in advance of the training, and 3) execution complies with organization's training budget.

Step 2 – Update Training Plan

Throughout the year, there may be a need to make changes to the approved Training Plan. In those instances, Managers and Supervisors will identify new task-achievement gaps and identify appropriate solutions to close those gaps. Such solutions may require additions, deletions, or substitutions to the approved Training Plan (refer to the ATMP User's Guide for specific instructions on how to do this in ATMP). The District Commander has delegated change authority to Division Chiefs (limited to the amount of their training budget). Each Division Chief sets their policy on change authority.

Step 3 – Report Execution

As specific training events on the approved Training Plan are completed, element Training Coordinators will 1) mark training complete in ATMP, and 2) input training course information in the employee's Training History for all mandatory training and all other training equal to or greater than 8 hours in length.

Appendix



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Training Brief FY04-08

Insert element name.




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Element Mission

Insert element's mission.




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Relevant Factors Affecting the Element

List factor's affecting the Element, such as, retirements, new mission, organization change, etc.



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Element Task List/ METL Assessment

Insert screen shot from ATMP.



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Tasks with a Significant Gap(s)

A.


B.

C.

D.

E.

List the tasks considered to have a significant gap(s).



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Task A

◆ **Description of Task:**


◆ **Gap(s) and Reason(s):**

◆ **Recommended Solution(s)**

- **Training:**
- **Other:**

Option 1 Format

Option 2 Format




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Task B

- ◆ **Description of Task:**
- ◆ **Gap 1**
- ◆ **Reason(s):**
- ◆ **Gap 1 Recommended Solution(s)**
 - **Training:**
 - **Other:**
- ◆ **Gap 2**
- ◆ **Reason(s):**
- ◆ **Gap 2 Recommended Solution(s)**
 - **Training:**
 - **Other:**



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Strategic Development of the Workforce

List the training event, employee's names, and total cost for items linking to Strategically Develop the Workforce. For example: LEAD; John Smith, Sally Joe; \$6,700



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Mandatory Training

List the mandatory requirement, the number of employees affected, and the total cost. For example: Overhead Crane Training; 26 employees; \$2,100



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Training Solution Factors

List factors impacting the selected training solutions, such as, Commander's emphasis in the annual training guidance, element's training budget, new regulation with training requirements, etc.



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Proposed Training Plan for FY04

Insert the screen shot form ATMP that is sorted by training course.



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"Other Solution" Plan for FY04

List those items on the Significant Task-Achievement Worksheets where "other" is selected as the appropriate solution path. Only those items that will be addressed during the indicated fiscal year should be listed.



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Feedback and Agreement on Next Steps

Training Evaluation

This process is currently under development. Upon completion, it will be forwarded to you and posted on the Training channel.